

# **Best Practices in Heritage Development from the National Heritage Areas Fall 2005**

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The heritage area movement in the United States represents a strategy for protecting heritage that transcends the traditional focus of historic preservation of structures and sites to encompass the conservation of their historic, cultural, and natural contexts. Heritage areas are founded on the concept that the best way to preserve historic and cultural landscapes is through partnerships and community participation. With its concern for creating sustainable local economies as a means of resource protection, the heritage area movement incorporates current historic preservation practice, which is increasingly concerned with revitalizing “main streets,” bringing back urban neighborhoods, and protecting farmland, with landscape-scale conservation, interpretation and tourism.

Best practices in national heritage areas are innovative management approaches in heritage development that achieve defined organizational goals related to the protection of cultural, natural, and historic resources as described in the national heritage area’s general management plan. A best practice may be a completely original technique or a refinement of an existing process. Due to the multi-disciplinary nature of heritage areas, their activities generally engage a broad spectrum of sustainable conservation practices, including preservation, education and interpretation, and tourism. The best practices highlighted here address a diverse array of organizational goals across ten broad categories. While many heritage area activities address a primary category or management objective, most involve a number of them:

- Community Revitalization
- Cultural Conservation
- Economic Development
- Education/Interpretation
- Heritage Tourism
- Historic Preservation
- Natural Resource Conservation
- Recreation
- Stewardship Building
- Strategic Engagement

The following ten best practices are by no means the only successful projects and programs occurring in heritage areas today, nor are they necessarily the “best” examples of what is occurring in national heritage areas and other collaborative conservation initiatives. Each of these projects and programs, however, presents a new idea, approach or lesson that heritage organizations and partnerships can apply in their own regional conservation initiatives.

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# Community Revitalization

## Delaware and Lehigh National Heritage Corridor Corridor Market Towns Initiative

**Description** The Delaware & Lehigh National Heritage Corridor is a 165-mile corridor in eastern Pennsylvania that historically linked the state's anthracite coal fields with East coast cities, helping to fuel the American Industrial Revolution. D&L's Corridor Market Towns Initiative (CMT) represents an innovative regional approach to community revitalization, delivering technical assistance and support to selected small towns that are working to improve their communities.

### Relationship to Goals

The Delaware and Lehigh National Heritage Corridor Commission (D&L) is the federal commission that serves as the corridor's management entity. The D&L management action plan identifies economic development and preservation as key to conserving communities and heritage in the corridor. Many of the partners identified in the plan are now engaged with D&L in the Market Towns Initiative.

### Partners

D&L's partners include the Pennsylvania Downtown Center; the Pennsylvania Department of Economic and Community Development (PA DCED), Department of Transportation (PA DOT), Department of Conservation and Natural Resources (PA DCNR); PPL Electric Utilities; Carbon County Commissioners; the Boroughs of Slatington and Lehigh; the Heritage Conservancy; and citizens groups in the Market Town communities. D&L is a national heritage area and a Pennsylvania State Heritage Park.

### External Investment

Funding for CMT heritage development projects, which include improvements to streetscapes, trails, and landscapes; new signage; enhanced traffic and pedestrian routing; and rehabilitation of historic buildings, comes from a variety of sources and has totaled \$8.4 million since 2002. Private support has mostly come in the form of matching funds for façade improvements in central business districts, and totals more than \$176,000. The largest project -- rehabilitation of the 1888 train station in Jim Thorpe -- cost \$650,000, and was funded by state and private sources. A PA DOT program, Hometown Streets, has provided \$1.3 million to fund central business district improvements. More than \$500,000 in federal Transportation Efficiency Act (TEA-21) grants has funded streetscape design and construction.

### Process

In 1999, D&L expanded its efforts to protect the corridor's natural, cultural, and recreational resources through economic development and preservation. The federal commission that managed the corridor created the position of Heritage Development Specialist to spearhead the effort. During this time, the Pennsylvania Department of Community and Economic Development was re-organizing its Main Street Program, an initiative to revive small town central business districts throughout the state. D&L pitched to PA DCED the idea of a regional approach to community revitalization. The agency decided that the corridor communities, linked by a shared history and physical connection and with coordination by a knowledgeable staff person with business and Main Street experience, offered a good chance that a regional approach would be

effective. As a result, D&L was tapped as the location for the state’s pilot regional revitalization project, the Corridor Market Towns Initiative.

In 2000, the towns of White Haven, Lansford, Jim Thorpe, Lehighton, Palmerton, and Slatington were chosen as the primary Market Towns. In 2002, D&L created the position of Market Towns Manager to assist citizen groups, nonprofits, and governments in 10 market towns (six primary and four secondary) develop and implement revitalization strategies identified by each town. In working with the towns, the manager follows the basic principles of the Main Street Four-Point Approach™ and the goals and objectives of the Pennsylvania State Heritage Park program. The manager coordinates community efforts on a regional basis and encourages and guides local initiatives. These initiatives have included conducting local business surveys and market analyses; holding community visioning exercises; and carrying out façade improvements and other rehabilitation projects. D&L provides grant-writing assistance for local improvement projects. The market town manager also updates community specific action plans and coordinates training and technical assistance provided by the Pennsylvania Downtown Center.

**Organizational Investment**

The market towns manager works full time on the project. D&L funds this position and CMT office operations. In addition, the development manager spends about one day per week on CMT. Paid interns from the Lehigh University Community Fellows Program (masters) and the Kutztown University Public Administration Program (undergraduate) also work on the project. The CMT office has part-time administrative help from D&L’s main office. The annual organizational investment is approximately \$35,000. The corridor’s NPS Heritage Partnership Programs allocation has contributed about \$48,000 per year to the project.



**Time Frame** While many local initiatives are of limited duration with clear beginning and end dates, the market towns manager works with towns on an ongoing basis to achieve local and regional program goals. CMT is a five-year project, with state funding through 2007.

**Outcomes** Data indicate that CMT has been successful at promoting community revitalization and heritage preservation. Between January 2002 and November 2005, the six primary market towns have realized a net increase of 25 businesses. Three landmark historic buildings – the railroad station in Jim Thorpe, the railroad engine house in White Haven, and a former high school in Lehighton – have been rehabilitated and put into adaptive use. Interpretive brochures, signage, and historic markers enhance the experience of tourists in all 10 market towns. More than 50 façade improvement projects have been completed utilizing design guidelines established by a

CMT partner, the Heritage Conservancy, and more are under way. The success of CMT has resulted in the authorization of additional regional revitalization projects by PA DCED even before the end of the five-year pilot project.

While CMT has had a positive impact, the process continues to evolve, says Dale Freudenberger, market towns manager. One lesson, incorporated into new approved projects, is that it is more effective to create new local and regional organizations to lead community development efforts than trying to refocus the purposes of established local groups.

**Challenge** From the beginning, D&L sought to stimulate interest in the program from corridor towns, and the response was nearly overwhelming. The manager began working in an additional four market towns; however, funding and staffing did not increase.

**Advice** An organization embarking on a similar community development program should “Be realistic in what (you) can achieve,” states Elissa Marsden, D&L heritage program development manager. “In our enthusiasm, we agreed to expand the scope of the program.” While CMT has been successful, Marsden believes the program could have had even greater impact if the original plan had been followed. The state appears to agree with limiting project scope, since recently approved Pennsylvania Main Street projects have no more than three or four communities in each.

Dale Freudenberger advises that the individual overseeing similar regional initiatives should be viewed by all as a coordinator rather than a manager. “This person should not be engaged in hands-on management,” he says. “This position is really about coordinating individual programs so that the region becomes stronger economically.”

#### **Contact Persons**

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Elissa Marsden and Dale Freudenberger, Delaware & Lehigh National Heritage Corridor Commission. Telephone interview, 22 November 2005.

# Cultural Conservation

## Rivers of Steel National Heritage Area Ethnographic Surveys

**Description** Rivers of Steel National Heritage Area (Rivers of Steel) is a 2,000-square-mile region of southwestern Pennsylvania indelibly associated with the history of the U.S. steel industry. Rivers of Steel's ongoing ethnographic surveys identify the arts, artists and artisans, and traditions and "tradition bearers" of the many ethnic groups that contribute to the region's rich cultural heritage. The area's survey methodology and the use of survey findings could be used as a guide for organizations seeking to preserve cultural traditions.

### Relationship to Goals

Cultural conservation is one of the primary goals of the Rivers of Steel National Heritage Area. Identifying the "living traditions" practiced in the area provides a foundation for all of the heritage area's programs and activities and recognizes that the residents of a community are a key resource for heritage development. Rivers of Steel is managed by the nonprofit Steel Industry Heritage Corporation (SIHC).

**Partners** Rivers of Steel's partners in the ethnographic surveys include the Pennsylvania Heritage Parks Program (PA Heritage Parks), Pennsylvania Council on the Arts, Institute for Cultural Partnerships, and the National Endowment for the Arts.

### External Investment

Funding for the ethnographic surveys has come from a variety of sources including the Pennsylvania Council on the Arts (PCA), the National Endowment for the Arts through its Folk and Traditional Arts Infrastructure Initiative, the Institute for Cultural Partnerships (ICP), and PA Heritage Parks. Rivers of Steel receives about \$12,000 annually to support fieldwork through the ICP/PCA Folk Arts Infrastructure Initiative. The Butler County Survey in 2006 will cost approximately \$15,000 and will use PA Heritage Parks funds.

### Process

The first ethnographic surveys were conducted as part of the preliminary planning for Rivers of Steel. The planning task force commissioned a series of baseline cultural studies including archival searches, literature review, and ethnographic surveys. According to Doris J. Dyen, director of cultural conservation, the purpose of the studies is to "paint a portrait of the people in the region with a focus on cultural arts, skills, customs, beliefs, practices and sites that are important to people and to assess what residents would like to see happen." The process requires intensive fieldwork including oral history interviews and audio-visual documentation of events and activities. The number of fieldworkers depends on the scope of the survey project. Fieldworkers have included people trained in public folklore, public history, applied anthropology, journalism, and documentary filmmaking.

The first ethnographic surveys were conducted in four communities in 1991. Beginning in 1992, Rivers of Steel conducted a "broad-brush" study that took in much of the heritage area and focused on the broad themes in the region's history. In 1993, the ethnographers concentrated on the industrial neighborhoods in the city of Pittsburgh, and in 1997, on Armstrong County (a combined ethnographic and historic sites survey). As the heritage area has been expanded, ethnographic surveys have been conducted in the

new areas in order to have the same kinds of data for all parts of the region. In 2006, a combined ethnographic and historic sites survey of Butler County is under way.

In 2000, staff began to revisit the surveys to update information and to ask those surveyed about what specific activities they might want to engage in to maintain their heritage. The survey process is ongoing in order to revise and implement management action plans for areas of the region.

### Organizational Investment

Two employees are engaged full time in cultural conservation work, a director and the cultural resource specialist, with the participation of other staff on specific projects. The cultural conservation director's salary is supported by Heritage Partnership Programs funding. The cultural resource specialist works directly with individuals and groups in communities on sustaining folk arts and cultural traditions. This position is funded through a grant from the Pennsylvania Council on the Arts in addition to funds from Heritage Partnership Programs. Project assistance has also been provided for the past three years by interns funded in partnership with the Mennonite Urban Corps PULSE Program. There is no money in SIHC's annual operating budget specifically for ethnographic surveys. The surveys are funded on a project by project basis, through grants from PA Heritage Parks (PHP) and matched with NPS Heritage Partnership Programs dollars (usually \$3 of PHP to \$1 of NPS). Total funding for the Armstrong County survey in 1997 was between \$12,000 and \$15,000, with approximately \$4,000–\$5,000 in labor and expenses per fieldworker.

Parishioners at St. John the Baptist Roman Catholic Church in Baden, PA, making pirogues. Leading the effort is Mafalda "Muffie" Cappabianco (on right).



At the Carnegie Library of Pittsburgh's Homewood Branch, a folk artist teaches African dance. Her appearance was in conjunction with the library's showing of the Rivers of Steel's traveling exhibit of folk arts, "Tricks of the Trade," which presents traditional arts of many ethnic groups in southwestern Pennsylvania and throughout the state.



**Time Frame** The time frame for a survey depends upon the size of the survey area and its population density. Each fieldworker's study has averaged about 12 months to complete.

**Outcomes** The ethnographic surveys serve as the basis for cultural conservation and tourism-related projects in the Rivers of Steel National Heritage Area. These projects have included:

- Tradition Bearers: a series of half-hour radio programs featuring stories of individuals and groups preserving cultural traditions in communities in the heritage area. The series began in 2004, and at the end of 2005, 10 programs have been produced.
- Routes to Roots: a driving guide to the cultural and industrial sites and heritage events in the seven-county region. Published by SIHC in 2004, the guide is designed to enhance the experience of heritage tourists.
- Folklife Directory: an online reference database to folk artists and folklife organizations in the region that serves as a resource for civic organizations and schools seeking to invite a folk artist or cultural "tradition bearer" to present a lecture, musical performance, or demonstration.

- Archives: A collection of materials related to the region's industrial heritage. The Rivers of Steel archives includes photographs, slides, taped interviews, ephemera, and small artifacts accumulated during ethnographic and other fieldwork.

As a result of Rivers of Steel ethnographic surveys, the organization has become the major clearinghouse for information on the culture of the region.

**Challenge** Identifying the individuals in a community who sustain cultural traditions requires considerable time and effort, since traditions are practiced by small, close-knit ethnic groups usually in private or semi-private settings.

**Advice** Dyen notes that people are sometimes reluctant to investigate other cultures because they don't know how to approach them. Her advice is "Don't be afraid to talk to people since word-of-mouth may be the only way to learn about a tradition." She recommends that an organization planning to do ethnographic surveys contract with individuals or teams experienced in ethnographic research, and, as fieldworkers begin to make their appointments, going along with them to meet people and to get to know the community. Above all, it's very important to "ask, don't tell," when doing cultural conservation, she says. "Be in the mode of asking a person or cultural group what they want to do to preserve a cultural tradition."

**Contact Person**

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Doris J. Dyen, Steel Industry Heritage Corporation. Telephone interviews, 5 December 2005 and 18 January 2006. Correspondence, 17 January 2006.



# Economic Development

## The Progress Fund Southwestern Pennsylvania Industrial Heritage Route

**Description** The Southwestern Pennsylvania Industrial Heritage Route, also called the Path of Progress National Heritage Route, stretches 500 miles through nine counties in southwestern Pennsylvania. The Path of Progress connects four National Parks, other historical sites and points of interest related to the westward expansion of the early United States across the Allegheny Mountains, including early settlement, battlefields, farming, the change from an agrarian to an industrial society, and the Industrial Age. The Progress Fund, a unique approach to creating sustainable economic development through heritage conservation, was created to provide financial assistance to heritage tourism businesses along the Path of Progress. The Fund supports the creation and growth of small businesses in the region through a revolving loan program and entrepreneurial counseling.

### Relationship to Goals

The Progress Fund seeks to bolster the regional economy by providing capital and business coaching to small businesses in the region's travel and tourism industry. The Fund's mission aligns with the economic development and community revitalization goals of the Westsylvania Heritage Corporation, the private, nonprofit organization that manages Path of Progress. The reach of the Progress Fund also matches the region of industrial heritage that Path of Progress commemorates, as well as all of West Virginia and Appalachian Ohio.

### Partners

The Progress Fund's partners include the Westsylvania Heritage Corporation, the Commonwealth of Pennsylvania, the U.S. Department of Agriculture (USDA), and several Pittsburgh-based foundations.

### External Investment

The Progress Fund has had a total of 30 different funding organizations since its founding. The Fund was established in 1997 with approximately \$1 million from the Allegheny Heritage Development Corporation, the predecessor to WHC. Currently, annual support from WHC covers about 10 percent of Progress Fund operating costs. In late 2005, major funding sources include the USDA Rural Development Program, the Appalachian Regional Commission, the state of Ohio, the Richard King Mellon Foundation, and the Pennsylvania Department of Community and Economic Development's First Industries Program, a 2005 initiative that supports the creation of new, tourism-related businesses in the state.

### Process

As Path of Progress approached the sunset of its establishing legislation in the mid-1990s, the area's management entity, the Southwestern Pennsylvania Heritage Preservation Commission, sought to identify ways to sustain heritage and contribute to regional economic development independent of federal assistance. The result of this process was the founding of the Progress Fund, a Community Development Financial Institution (CDFI).

The Progress Fund describes its first six years, both prior to and after incorporation, as "foundation setting." Tasks included developing a strong and committed Board of

Directors, adding key staff, establishing policies and procedures, and refining administrative systems to manage capital assets. Over the same period, the Fund was also underwriting 30 tourism loans.

A recent grant from The Progress Fund allowed Shannon and Melissa Jacobs, owners of the Jean Bonnet Tavern, to move a Revolutionary War-era log cabin to their property and after renovation, put it to use as a gift shop.



The Baker family expanded their farming operation with the help of The Progress Fund. They began raising alpaca as an agri-tourism venture, Terrace Mountain Alpacas.

Typically entrepreneurs are referred to The Progress Fund by local banks, state economic development programs, or local offices of the Small Business Administration. These individuals' lack of assets or unusual business plans may make them poor credit risks for conventional financial institutions. People also learn of the Fund through the organization's website site or by word-of-mouth from other entrepreneurs.

A loan applicant's first contact with The Progress Fund is usually by telephone or through completion of an online intake form available on the Fund's website. Individuals invited to apply for a loan then submit an

application which allows the Fund to determine how it can help the business. The application form is available online and must be submitted with a non-refundable application fee of \$200. Upon reviewing the application, the Fund's loan officers may authorize a loan, or provide individual counseling before lending capital. The Fund does not offer classes, but may advise an applicant to enroll in workshops offered by a local Pennsylvania Small Business Development Center to acquire specific business skills.

Loans made by The Progress Fund can be used to purchase property and equipment, restore and rehabilitate structures, and provide working capital. Interest rates are set depending on risk level. The loans often require collateral, which may be in the form of real estate, equipment, inventories, receivables or personal assets, or may be made against projected cash flow.

Fund loans have ranged from \$20,000 to about \$500,000. The larger loans represent major projects by established businesses and usually represent a portion of the capital needed, with other funding coming from a bank or other financial institution. The Fund's median loan amount in 2005 was \$118,000.

### **Organizational Investment**

The Progress Fund's two loan officers work directly with entrepreneurs. The president and CEO, David Kahley, who co-founded the Fund and served as its first employee in 1997, is primarily focused on building and strengthening partnerships with funders. The Progress Fund's Fiscal Year 2005 operating budget is \$1.9 million.

### **Time Frame**

It took about two to three years to get The Progress Fund up and running. The loan application process can take as little as two weeks; however, the time frame depends on the individual borrower's preparation and on the amount of counseling needed to work with them through the loan process. Loan terms are from five to 10 years.

### **Outcomes**

The Progress Fund was established in 1997 with approximately \$1 million in assets and one employee, and has grown to an organization with eight employees and more than \$15

million in assets. Since 1997, The Progress Fund has made 152 loans totaling more than \$11.3 million and provided more than 5,200 hours of business counseling. It has contributed to regional economic development by creating or retaining more than 870 jobs. In addition, the Fund has assisted in the rehabilitation of 50 historic buildings by providing loans to small businesses for adaptive reuse.

The Progress Fund's demonstrated success in assisting small business development in southwestern Pennsylvania has led to its expansion into neighboring states. In 2002, at the urging of regional foundations, and state and federal agencies, the Fund began operating in northern West Virginia. In 2005, the state of Ohio awarded a grant to The Progress Fund to support small business development in the 29 Appalachian counties of Ohio. Recently, the fund was invited to acquire a \$1.2-million fund in Ohio with a similar mission but focused on agricultural development. In addition to supporting heritage tourism in the region, the Fund is now assisting in the development of agri-tourism ventures by farms in southwestern Pennsylvania.

**Challenges** The Progress Fund's early challenges included getting the first investors and finding skilled financial professionals willing to work for under-market salaries. Marketing, initially on a one-to-one basis, has helped to gain recognition for the Fund's approach to economic development and gain funding partners. Its management team has grown over time with the addition of experienced lending professionals attracted by the opportunity to contribute to community revitalization in the largely rural region.

**Advice** David Kahley states that not every heritage area has the financial means or is at a stage of development to establish a revolving loan fund, although the lack of capital may stall "heritage efforts "because (heritage) businesses have unique characteristics which are too non-traditional for conventional commercial banks. Without some form of financing, lots of potential businesses will be stopped before they can get started." For heritage areas that want to start a financial organization, he recommends surveying 100 businesses that are of a type that support the organization's heritage mission. If the inability to obtain bank loans is cited frequently by business owners as an impediment to growth, Kahley says, "Then you're on to something," and the next step would be to explore partnerships with the state or economic development organizations willing to fund a loan program. He also suggests that preservation organizations should be more creative in preservation strategies for historic buildings. He says, "There is so much more opportunity to preserve our architectural heritage by helping a business get into an historic building, rather than following the typical and often failed approach of making the building a museum...It is far better to have a thriving business save and reuse a building than of encapsulating the building as a museum."

**Contact Persons**

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David Kahley, The Progress Fund. Telephone interview, 2 December 2005.

# Education and Interpretation

## MotorCities National Heritage Area Steven P. Yokich Education Program

**Description** The MotorCities National Heritage Area (MotorCities) encompasses portions of 13 counties in central and southeastern Michigan that contain a total of more than 1200 auto-related resources. MotorCities' Steven P. Yokich Education Program, "Kidz!," is an innovative approach to teaching regional history employing a unique, K-12 curriculum focused on U.S. automobile heritage. The Web-based program is a resource for both teachers and students with downloadable lessons plans, interactive games, videos, and links to museums and historic sites.

### Relationship to Goals

MotorCities is dedicated to preserving, interpreting, and promoting central and southeastern Michigan's rich automobile and labor heritage. One of the heritage area's major goals is to bring this heritage to life for the region's nearly six million residents. Through the Yokich Education Program and other activities, MotorCities is closer to achieving this goal. The heritage area's management entity is a 501 (c) (3) organization, the Automobile National Heritage Area Partnership, Inc.

### Partners

MotorCities' partners in the program include the United Auto Workers (UAW); Ford, Daimler Chrysler, and General Motors; and the University of Michigan (Dearborn) Center for the Study of Automobile Heritage.

### External Investment

The UAW contributed \$750,000 to develop the \$1 million Yokich Education Program, with additional funds from the "Big Three" automakers (Ford, Daimler Chrysler, and General Motors). The total project cost includes consultant fees, resources and materials for schools, website development, and one staff member's salary.

### Process

In 2002, MotorCities approached the UAW, one of its founding partners, with the idea for an educational program that would explore automotive and labor history. With UAW's financial commitment, formal development of the program began. The area's education manager and a curriculum consultant developed the 20 lesson plans that form the basis of the program. The lesson plans were reviewed the area's education committee and a group of historians. Then, a number of teachers tested the lesson plans in the classroom and provided feedback. Lesson topics include Unionization, Working on the Assembly Line, Migration to Michigan, and World War II: Women, Minorities, and Social Change. The content of the lesson plans was enriched the MotorCities Memories Oral History Project conducted by the Center for the Study of Automotive Heritage. The project resulted in more than 60 oral history interviews of former labor and auto union leaders and workers. Museums that partner with MotorCities in its educational programs also contributed content used in the lesson plans. In addition, many of them offered free or reduced admission for field trips by participating schools.

The committee selected the Internet as the delivery mechanism for the Yokich Education Program because of its low distribution cost and the relative ease of updating information. The website -- [www.motorcitieskidz.org](http://www.motorcitieskidz.org). -- contains the (downloadable) lesson plans, additional classroom activities, links to partner museums, historic photos,

videos (based on the oral history interviews), and interactive games. The curriculum is aligned with federal “No Child Left Behind” and Michigan Educational Assessment Program K-12 standards.

MotorCities mailed brochures inviting participation in the program to all schools in southeastern Michigan. Later, workshops for teachers acquainted them with the lesson plans and gathered feedback that allowed adjustments to content before the program was launched. A quarterly newsletter, “The Ride,” was developed to highlight activities at schools participating in the Yokich Education Program, describe additional online resources, and provide information on sites for possible field trips.

### Organizational Investment

During development and initial implementation period, one MotorCities staff person was dedicated full time to the program. The curriculum consultant was under contract for one year. A small amount of Heritage Partnership Programs was used to fund the project.

### Time Frame

Program development took approximately 18 months. The committee began developing the lesson plans in late 2002. The oral history interviews were conducted over a year, beginning in early 2003. Teacher workshops were held in 2003. The Web site was up and running in May 2004.

### Outcomes

According to MotorCities, more than 100,000 K-12 students have had the opportunity to learn about the area’s automotive and labor heritage through the Yokich Education Program. A total of 207 schools in central and southeastern Michigan have participated in the program, and more than 6,000 teachers receive the newsletter. In September 2005, the program was recognized by the State Historical Society of Michigan with its 2005 State History Award in the educational program category.

With further support from the UAW, the curriculum is now being expanded with additional lesson plans. The success of the Yokich Education Program has also helped MotorCities expand its educational activities. For example, a partnership with the Collector’s Foundation will result in new lesson plans for high school students on car restoration and careers in the field. In 2004, a \$3,500 Save Our History grant to MotorCities from the History Channel engaged more than 150 students in the recovery and preservation of the Yankee Air Museum, destroyed by fire in 2004.

Beyond the classroom, some parents report using the program website as a resource for family trips.

Experiential activities are an important element of the Yokich Education Program curriculum. Here, students learn about assembly line manufacturing.



An art show sponsored by MotorCities drew entries from K-12 students.



**Challenge** While the Internet was chosen as the program delivery mode for several compelling reasons, incompatibility of operating systems and other problems initially limited wide access to the lesson plans.

**Advice** MotorCities Education and Development Manager Pamela Rhoades Todd recommends talking to a school district's technology department to ensure that teachers can take advantage of the online resources. Todd also recommends involving teachers from the beginning in program development since they are the primary users. Based on teacher feedback, a future version of the program is likely to include a printed booklet of lesson plans, Todd says, so that "teachers can have a copy on their desks."

**Contact Person**

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Pamela Rhoades Todd, MotorCities-Automobile National Heritage Area Partnership, Inc. Telephone interview, 17 November 2005.

# Heritage Tourism

## South Carolina National Heritage Corridor Corridor Discovery System

**Description** The South Carolina National Heritage Corridor (SCNHC) extends 240 miles across the state through 14 counties, from the port city of Charleston to the foothills of the Blue Ridge Mountains. The Corridor Discovery System (Discovery System) is an innovative regional approach to tourism, helping visitors navigate the historic, cultural, and scenic resources of the region through a comprehensive network of visitor centers, interpretive sites, and Web-based travel guides.

### Relationship to Goals

The Corridor Discovery System aligns with SCNHC's management plan goals to promote the entire corridor as a tourist destination by improving visitor infrastructure and to use tourism as a tool for rural economic development. SCNHC is managed by a Partnership Board of Directors. The South Carolina Department of Parks, Recreation, and Tourism serves as the fiscal and administrative agent for the program.

**Partners** Partners in the Discovery System include members of local, county, and regional boards, heritage businesses and sites, local governments, and other state of South Carolina agencies.

### External Investment

State bond bills have funded the construction of three Discovery Centers, two Discovery Stations, as well as eight interpretive signs per county. South Carolina Department of Parks, Recreation, and Tourism funds operational costs of the Discovery Centers. Individual counties help fund tourism product development initiatives and programs. Corporate sponsors underwrite individual projects. Over \$1.8 million in SCNHA grants to Discovery Sites in the Corridor using Heritage Partnership Programs funding has leveraged approximately \$30 million in public and private funds for site enhancement.

**Process** Beginning in the early 1990s, a number of local, regional and state planning initiatives demonstrated how South Carolina's rich heritage resources could be used as a catalyst for community revitalization and rural economic development through tourism. The Heritage Corridor Plan developed in 1996 created the basic framework for the Discovery System, dividing the corridor into four regions from west to east – Mountain Lakes; Freshwater Coast; Rivers, Rails, and Crossroads; and Lowcountry – and establishing two tourist routes, the Nature Route which explores the region's scenic and recreational resources, and the Discovery Route, which illuminates the area's history. In addition, implementation of the plan resulted in the development of a series of "niche" trails that follow individual themes, for example, Garden Destinations. The development of the Corridor Discovery System began in Region 1.

The first step in each region was to engage community residents in identifying the area's historic, cultural, and scenic resources, and to verify this information with scholars. The second step was to acquire funding for the regional Discovery Center and for Discovery Stations (large scale exhibits located in existing visitor centers). The third step was the design, fabrication, and installation of interpretive exhibits. The steps in the process were taken sequentially: As development in Region 1 entered the design phase, funding for



Region 2 was under way, and so on. Discovery Stations and Discovery Sites (individual attractions with interpretive signage) continue to be developed.

The Discovery System remains at its core a community-based or grassroots program, with local, county, and regional boards providing feedback on new Discovery Stations and Sites and on new programming. Volunteers support visitor services at Discovery Centers and Stations. SCNHC helps approved Discovery Sites across the four regions improve visitor experiences through a program of grants and technical assistance.

### Organizational Investment

Each Discovery Center has a staff of three--one full-time and two part-time employees. The annual operations budget for each center is \$175,000, which is borne by the SC Department of Parks, Recreation, and Tourism. Eight SCHNC staff members are directly involved in the ongoing coordination and development of the Discovery System. A portion of the heritage area's annual Heritage Partnership Programs appropriation is used to cover associated costs and to fund its competitive grants program (\$1.8 million since 1997).

**Time Frame** Development of the Corridor Discovery System began in 1997. The Region 1 Discovery Center opened in 2001, the Region Two Discovery Center in 2004, and the Region 3 Discovery Center will open in spring 2006. The development of the niche trails should be completed by end of 2006. Development of new Discovery Sites will be ongoing.

**Outcomes** Visits to Discovery Centers and Discovery Sites have grown at an average rate of 25 percent since the program began tracking visitation. A previously mentioned, grants to Discovery Sites in the corridor's 14 counties since 1997 and has leveraged approximately \$30-million in private and public funds for site enhancement. In a 2005 survey, more than 89 percent of sites reported at least a 50 percent increase in visitation since becoming involved with the SCNHC.

**Challenges** Getting local people to "think beyond county boundaries," i.e., on a regional level, has been the biggest challenge to developing the Corridor Discovery System. Adopting a regional perspective is important, states Michelle McCollum, because it enables rural communities with limited financial resources to market themselves effectively.

An additional challenge, according to McCollum, is the widespread belief on the part of historical societies and local preservation organizations that the rest of society will support preservation for preservation's sake." Because this is not the case, she says, "We

Table Rock, Pickens, South Carolina



Challams' Split Creek Festival



advise nonprofits to determine how much money they need and teach them that it's ok to make a profit in order to be self-sustaining.”

**Advice** McCollum advises organizations developing grassroots heritage tourism efforts to “make sure the economic development entities are around the table at the very beginning.” She states that while the participation of local historical societies and local museums was critical in developing content of Discovery Centers, SCNHC found that bringing in county councils and economic development groups at a later time made it more difficult to realize the Corridor system concept.

**Contact Person**

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# Historic Preservation

## Wheeling National Heritage Area Adaptive Reuse Study

**Description** Wheeling National Heritage Area is wholly contained in the city of Wheeling, West Virginia, an historic transportation hub and industrial center located on the Ohio River. In 2003, the area's management entity, the Wheeling National Heritage Area Corporation (WNHAC), pioneered a new course in institutional promotion of historic preservation by commissioning a team of local architects and engineers to evaluate the condition of four vacant historic buildings and to prepare feasibility studies for their adaptive reuse.

### Relationship to Goals

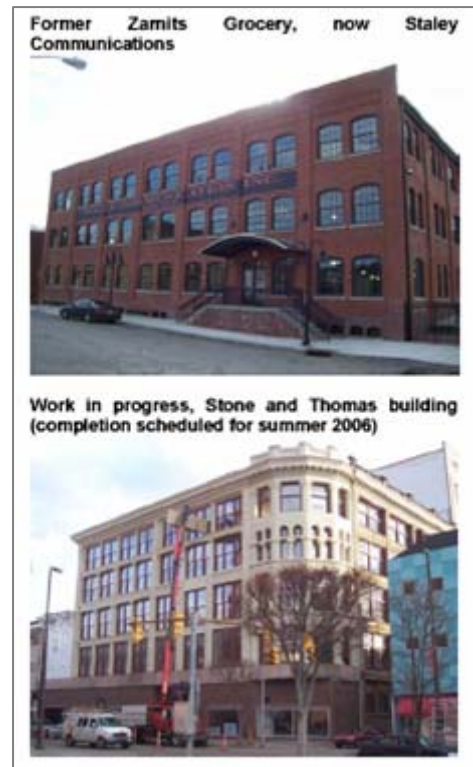
The organization's management plan includes as one of its primary goals the utilization of historic resources to stimulate economic development. The plan also identified the location where the project's buildings stand as a priority area for economic development activities.

**Partners** WNHAC's partners included the City of Wheeling and the Regional Economic Development Partnership (RED), a public-private organization that promotes economic development in three counties in the Ohio River Valley.

### External Investment

WNHAC's initial investment of \$54,000 for the study has been leveraged into a private sector investment in the buildings of over \$17.2 million.

**Process** As a former industrial center that supported the nation's western expansion in the 19<sup>th</sup> century, Wheeling has many large commercial buildings. Buoyed by the success of an earlier adaptive use project which transformed the 88,000-square-foot Wheeling Stamping Building into the global operations center of an international law firm, WNHAC wanted to be ready to capture similar opportunities in the future.



In 2003, WNHAC and a design team of architects/engineers identified four large buildings in downtown Wheeling with apparent potential for reuse, all of them listed in the National Register of Historic Places. The buildings include the former Stone & Thomas Department Store (181,730 square feet); Wheeling Wholesale Grocery (94,750 Square feet); Helig-Myers/Reicharts Furniture (82,800 square feet); and Zarnits Grocery (32,000 square feet). The buildings were privately owned, but neglected and vacant.

The design team prepared separate reports on each building that included a general structural assessment, proposed exterior and interior renovations, code compliance issues,

floor plan drawings for potential uses, and cost estimates for proposed renovations. Following completion of the study, WNHAC gave the reports to RED, which identified potential tenants and marketed the properties.

**Organizational Investment**

WNHAC used \$54,000 from its NPS Heritage Partnerships Programs appropriation to pay architects/engineers' fees for the adaptive reuse study. Incidental costs and staff salaries associated with oversight of the study were covered by the organization's operating budget.

**Time Frame** The adaptive reuse study project took six months.

**Outcomes** By late 2005, two years after the project began, all four buildings have new owners and either have been or will soon be put into use. The new owners are RED; West Virginia Northern Community College; Santco, Inc., a medical records management and billing company; and Staley Communications, Inc., a regional wireless communications systems management firm. The project's economic impact also includes increased local government revenue (through new property taxes), and creation of more than 200 new jobs as well as significant retention of local jobs. Beyond its immediate economic impact, the project has served to increase local awareness of the benefits of the adaptive reuse of historic buildings.

WNHAC has continued to conduct adaptive reuse studies. It is currently focusing on smaller buildings, especially those that can have a major impact on their neighborhoods, either because they are corner buildings or possess special architectural significance.

**Challenges** As in many communities, WNHAC has to constantly make the case to local government officials that preserving historic buildings instead of demolishing them has significant benefits for current and future residents.

**Advice** Organizations seeking to be successful at promoting the adaptive reuse of historic buildings need to recognize the value of partnerships, says Hydie Friend, executive director of the WNHAC. "Look for partners who have expertise you don't possess," Friend states. In this project, the City of Wheeling "came to the table" with economic development funding, RED marketed the buildings to potential buyers and secured Small Business Administration loans, and WNHAC contributed its knowledge of historic preservation and the benefits of historic tax credits. Contacting the State Historic Preservation Office for technical advice early in the project helped ensure that projects would be eligible for the Historic Rehabilitation Tax Investment Credit, which made the projects more attractive to property owners.

**Contact Person**

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# Natural Resource Conservation

## Yuma Crossing National Heritage Area Yuma Crossing East Wetlands Restoration

**Description** Yuma Crossing National Heritage Area (Yuma Crossing) encompasses a 22-square-mile area along the lower Colorado River in and around the city of Yuma, Arizona. The Yuma Crossing East Wetlands Restoration Project (East Wetlands) is a multi-year, \$18- to \$20-million endeavor to restore native habitat and water flow along a five-mile stretch of the river. Because of the number and breadth of stakeholders engaged in the planning process and the technical knowledge developed during the course of the project, East Wetlands could help guide other areas in the country undertaking wetlands restoration.

### Relationship to Goals

One of the major goals of Yuma Crossing is to conserve Yuma's cultural and natural resources through collaboration and partnerships. Resource conservation such as the East Wetlands project is identified in the management plan as key to community revitalization. The Yuma Crossing National Heritage Area Corporation (YCNHAC) is the area's management entity.

### Partners

YCNHAC's major partners in East Wetlands include the city of Yuma; Yuma County; the U.S. Bureau of Reclamation, Yuma Office; the Quechan Indian Nation; and the National Park Service. In all, there are 28 stakeholders in the project, including 16 landowners and federal, state, and local government agencies.

### External Investment

YCNHAC has leveraged \$400,000 of its NPS Heritage Partnership Programs funds over five years to raise approximately \$6 million of the total project cost. Most of the support is in the form of grants from local, state, and federal agencies including the city of Yuma, the Quechan Indian Nation, Arizona Water Protection Fund, Arizona Game and Fish, U.S. Bureau of Reclamation, U.S. Fish and Wildlife Service, Environmental Protection Agency, and U.S. Bureau of Land Management. Additional support for the project has come from the National Fish and Wildlife Foundation, North American Wetlands Restoration Council, and Sonoran Joint Venture.

### Process

One of the first projects undertaken by YCNHAC was the rehabilitation and reopening of the historic Ocean-to-Ocean Highway Bridge that links the east and west banks of the lower Colorado River. The cooperation of various public and private entities in the bridge restoration signaled that a larger project was achievable.

The development and implementation of the East Wetlands project has been a lengthy process, with several key components. Work on the first component – building consensus and support among stakeholders – began even before Yuma Crossing was designated a National Heritage Area in 2000. The second component – comprising development of the concept plan, conduct of thorough ecological and archaeological surveys, environmental testing, and development of the comprehensive (365-page) East Wetlands Restoration Plan – took two years. Fred Phillips Consulting led this effort and remains on the project. The East Wetlands plan was approved by all stakeholders in 2003. The third component – funding the project – received a major boost in 2003 with a \$500,000 grant from the Bureau of Reclamation to fund the first phase of the plan. The fourth component –

obtaining the requisite Section 404 permit from the U.S. Army Corps of Engineers – was received in 2004. Work began immediately on clearing non-native vegetation from 200 acres of the 1400-acre project area and replanting with native cottonwood, willow, and mesquite. In summer 2005, excavation began of a 1.5-mile back channel to increase flow to the river’s historic south channel. This phase of the project, costing nearly \$1 million, should be completed early in 2006. As holder of the 404 permit, YCNHAC will continue its coordination of the project until completion.

### **Organizational Investment**

Five YCNHAC staff members have worked on various components of the East Wetlands project since it began. In addition to the executive director, contributing staff include a grant writer, grants manager, planner, and construction project manager. Their salaries are part of the nonprofit corporation’s annual operating costs. As previously mentioned, about \$400,000 of the area’s total Heritage Partnership Programs allocation over five years has been dedicated to the East Wetlands project. Through a 10-year contractual agreement, the City of Yuma contributes to the area’s basic staff and operational costs in a local match of federal heritage area funding. This match totals about \$500,000 per year.

**Time Frame** From planning stages to achievement of sustainable habitat, the East Wetlands project should take about 10 years, ending in 2011.

**Outcomes** YCNHAC can point to a number of achievements at the halfway point in the East Wetlands project. The reclamation of one of the most degraded areas of the Colorado River is proceeding according to plan, with 200 acres replanted with native species as of December 2005. The process of cutting back channels to improve water flow and reduce salinity currently under way should result in the reclamation of an additional 300 acres in the next two to three years. While the number of acres reclaimed is impressive, these gains represent a continuing struggle to replace non-native species and find the proper mix of plants for the restored habitat. The project’s reintroduction of native cottonwoods, willows, and mesquite is helping to drive a new industry as local landowners convert part of their lands to develop plants for sale. Five years after the beginning of the project, residents are enjoying recreational activities in the area, including bird watching, hiking, and canoeing.

In addition to making important contributions to the technical practice of wetlands restoration, the project can be used as a guide to community engagement in planning. Based on the mutual trust and respect developed among numerous stakeholders over a number of years, YCNHAC was able to get all of the parties to agree to proceed with the restoration without resolving conflicting claims of land ownership, and those claims to water rights associated with them. Untangling the web of claims could have taken many years as the wetlands continued to degrade.





**Challenge** In the Southwest, water rights are a hotly contested issue. Getting permission from the 16 East Wetlands landowners to hold in abeyance for the purposes of this restoration project conflicting claims of land ownership was a major breakthrough in the planning process and an encouraging development for future wetlands restoration initiatives along the Colorado.

**Advice** When working with the community, it's important not to go in with preconceived notions of what needs to happen, says Charles Flynn, executive director of Yuma Crossing National Heritage Area Corporation. In addition, be careful to act in a manner that respects not only residents opinions, but their emotions, Flynn states. He gives as an example YCNHAC's decision not to support the proposed designation by the U.S. Fish and Wildlife Service of a new "area of critical habitat" in the Yuma area. "We told them that this designation would not add one more acre to the restoration and would create fear among the farmers (of government interference)," Flynn states. "What's important is what's 'on the ground' getting done. Protecting a larger area would be contrary to voluntary efforts at restoration."

**Contact Person**

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# Recreation

## Ohio & Erie National Heritage CanalWay Development of the Towpath Trail

**Description** The Ohio & Erie National Heritage Canalway follows the route of the historic Ohio & Erie Canal through farmland, villages, and metropolitan areas between Cleveland and New Philadelphia, Ohio. Since designation in 1996, the corridor's management entity has worked to fully develop the canal's towpath as a 101-mile multi-use, recreational trail system by providing guidance, technical assistance, and financial assistance to public and private stakeholders along the route. The scope of the Towpath Trail project, which has involved working with a large, diverse group of partners over a long period to preserve and enhance a community asset, should be instructive for organizations engaged in similar efforts.

### Relationship to Goals

The Towpath Trail project is central to realizing the goals described in the heritage corridor's management plan, specifically to identify, preserve, protect, enhance, interpret, and promote the canal corridor's associated historic, cultural, and recreational resources.

### Partners

Since the heritage corridor was established, more than 90 community partners have worked with the heritage area's management entity, the Ohio & Erie Canalway Association through its partner organizations, the Ohio Canal Corridor and the Ohio & Erie Canalway Coalition, to develop the Towpath Trail. Community partners include the 42 corridor communities; the state of Ohio; park departments in Cuyahoga, Summit, Stark, and Tuscarawas counties; Cuyahoga Valley National Park; conservation and environmental groups; convention and visitors' bureaus; and local businesses and major corporations.

### External Investment

Since 1996, approximately \$50 million has been invested in Towpath Trail projects. Of these funds, about \$2 million came from the NPS Heritage Partnership Programs funding; \$14.5 million in support has come from other federal sources, mainly through Transportation Enhancement Act (TEA-21) grants. The state of Ohio has invested \$7.2 million, while local governments have contributed nearly \$14.5 million. Private investment in Towpath Trail projects total nearly \$10.4 million. (Source: Ohio & Erie National Heritage Canalway, *State of the Canalway*, 2004.)

### Process

The Towpath Trail was first envisioned as a regional recreational resource and conservation area in the 1960s. Over the next three decades, sections of the trail were developed through the efforts of individuals, organizations, and governments along the trail route, particularly after the creation of the Cuyahoga Valley Recreation Area in 1974 (re-designated a national park in 2000). The designation of the Ohio & Erie Canal National Heritage Canalway in 1996 created a management organization that could both coordinate public and private development efforts and provide financial support for a number of initiatives, including the Towpath Trail.

At the time, more than half of the 101-mile trail was unimproved and 85 miles of it was owned by some type of public entity, whether federal, state, or local government. Through the years, the development of the Towpath Trail has been a multi-faceted project

involving dozens of entities. The Ohio & Erie Canalway Coalition and Ohio Canal Corridor are leading the project, with staff engaged in developing partnerships and facilitating the efforts of local governments and state agencies related to trail improvements.



In developing corporate support, the emphasis is on matching corporate marketing and community development goals with corridor goals to preserve, enhance, and promote the heritage corridor's cultural, historic, and recreational resources. For example, Goodyear Tire & Rubber Company sponsored Towpath Trek 2005, a special program to attract people to walk, bike, or hike four new sections of the trail. "Healthy Steps," sponsored in 2005 by the Akron General Medical Center, encouraged walking the Trail as a means to a healthier lifestyle. The value of the Trail as a regional "quality-of-life" amenity is a significant factor in gaining corporate support. Ohio Canal Corridor operates an annual Towpath Marathon on the Ohio & Erie Canal Towpath Trail through the Cuyahoga Valley National Park.

One recent local initiative related to trail development is the Summit County Trail and Greenway Plan. The Ohio & Erie Canalway Coalition is working with several local committees to assist in the implementation of the plan in their communities.

### **Organizational Investment**

The cost of individual Towpath Trail projects can range from \$100,000 to commission an environmental study or for interpretive signage to \$1 million to plan, design, and construct 2-3 miles of improvements including building culverts and pedestrian bridges. (One project, a pedestrian bridge spanning Interstate 77, cost \$2 million.) Two staff members work full time on the Towpath Trail project. Their salaries are part of the organization's annual operating budget which is supported in part with Heritage Partnership Programs funds.

### **Timeline**

Development of the Towpath Trail began after designation of the canalway as a national heritage corridor in 1996. Completion of improvements to the 101-mile Towpath Trail should occur in 2016, about 20 years after the effort began.

### **Outcomes**

The development of 73 miles of the Towpath Trail is now complete. Projects have included improving access from local communities, adding interpretive and wayfinding signage, installing landscaping, and resurfacing. Planning for the development of the remaining 28 miles is currently under way.

Since 1996, the Towpath Trail has become a regional recreational resource, with more than 3.5 million hikers, bicyclists, and horseback riders utilizing the trail system annually. The Towpath Marathon alone drew 1,500 participants and spectators in 2005. Trail improvements have also inspired more cooperation within communities and among local

jurisdictions, including the development of regional trail and greenspace plans. The project has also resulted in the creation of the first parks department in Tuscarawas County. In addition, corridor counties have taken responsibility for trail maintenance within their boundaries, which should help ensure sustainability of the Towpath Trail.

**Challenge** Some areas along the trail had experienced a long period of economic disinvestment before heritage corridor designation which had compromised historic and recreational resources. Encouraging local businesses and governments to share the new vision for the Towpath Trail required significant effort at the beginning of the project.

**Advice** Dan Rice, president and CEO of the Ohio & Erie Canalway Coalition, notes that a long-term project like the development of the Towpath Trail is “all about process.” He says, “It’s a marathon, not a sprint. It takes time to get the resources together, including community engagement and buy-in by corporate CEOs.” In addition, for a project like this to be successful he believes, it “must be locally ‘owned’ and locally driven, not run from Washington or a state capital.” Finally, he suggests, “You’re going to spend a lot of time at this, so you might as well have fun.”

**Contact Person**

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# Stewardship Building

## Essex National Heritage Area Trails & Sails: A Weekend of Walks and Water

**Description** Trails & Sails is an annual event held on a single weekend in the fall that builds regional awareness of the rich historic, cultural, and natural resources in the Essex National Heritage Area. The heritage area is a 500-square-mile region that encompasses Essex County in northeastern Massachusetts. In 2005, Trails & Sails featured 126 free activities, including nature hikes, historical tours, craft demonstrations, bicycling, whale watching, and more. The heritage area's coordination and management of Trails & Sails can inform the efforts of other areas seeking to ensure sustainability of heritage resources through direct community engagement.

### Relationship to Goals

The mission of the Essex National Heritage Area Commission, Inc., (ENHAC), the nonprofit corporation that manages the heritage area, is to promote and preserve the historic, cultural and natural resources of the region. Trails & Sails furthers this mission in a number of ways, particularly by creating awareness, inspiring residents to become stewards and advocates of the region's assets, and fostering public and private partnerships and regional collaboration among ENHAC and participating sites.

**Partners** Partners in the 2005 Trails & Sails included the 71 sites, organizations, and heritage businesses that hosted events. Corporate sponsors included Eagle-Tribune Publishing, TD Banknorth, and the North Shore Medical Center.

### External Investment

Corporate underwriting of the 2005 event totaled \$20,000. Eagle-Tribune Publishing contributed to the printing of 165,000 copies of the 20-page program booklet, and helped promote the event by inserting the booklet in 145,000 newspapers countywide, providing expanded pre-event coverage, and enhancing ENHA advertising purchases. TD Banknorth helped fund the printing cost and distributed the booklet in its branches throughout the region. The value of the reinvestment contributed by the 71 partner sites (calculated in terms of waived admission fees, for example) and of volunteer time (229 people volunteered 886 hours) totaled approximately \$75,000.

**Process** 2005 marked the fourth annual Trails & Sails. The event was originally modeled on popular events presented by two other National Heritage Areas: Quinebaug & Shetucket Valley National Heritage Corridor's Walking Weekends and the Hudson Valley NHA's Hudson River Ramble.

Producing an event the size of Trails & Sails requires an ongoing, year-round commitment. Beyond fulfilling administrative tasks directly related to event production, the ENHAC staff is engaged throughout the year in developing partnerships with potential sponsors and participating sites. The director of heritage tourism works with local organizations to help them create interesting Trails & Sails visitor experiences, and to help them recognize the benefits of developing and implementing an ongoing marketing program. Feedback from partner sites and participants helps staff identify specific areas for improvement to enhance next year's event.

## Organizational Investment

Coordinating Trails & Sails occupies one-third of the time of the ENHAC director of heritage tourism year round. Two weeks before and following the weekend, the director and an assistant spend 50 percent of their time on the event. Just prior to and during the Trails & Sails weekend, all ENHAC staff members are involved to some extent. NPS Heritage Partnership Programs funding helps support staff salaries and other organizational operating expenses.

The budget for the 2005 Trails & Sails event was \$33,000 (excluding staff salaries) and was used for design and printing of the booklet, posters, and souvenir stickers; advertising; postage; and distribution. Heritage Partnership Programs funding covered the \$13,000 in expenses not covered by corporate underwriting.

**Time Frame** The date for the next year's Trails & Sails is selected before the current year's takes place. Planning begins in December. A call for events goes out to organizations about six months prior to the event. The program booklet is printed in July.

**Outcomes** ENHAC reports that both local residents and tourists are enthusiastic participants in Trails & Sails. More than 3,600 people participated in 2005, a 21-percent increase over the previous year. A total of 71 sites, organizations, and heritage businesses hosted events, an 18 percent increase in participation over 2004. A survey of 2005 hosts and participants revealed that the event was a positive experience for everyone: 93 percent of hosts responding said they would participate in 2006; 87 percent of participants said they would return to visit a site or organization in the future; and 100 percent said they would participate in another Trails & Sails.

Some participants in the very first Trails & Sails event (2002) noted that they would like the opportunity to have a similar visitor experience more than once a year. To meet this demand, ENHAC created the Explorers Program, a special year-round program of members-only events based on the Trails & Sails model. In just three years, the Explorers Program has grown to more than 500 members.

Additional benefits from Trails & Sails, according to Annie Harris, executive director of ENHAC, include more visibility for the organization, a more engaged board, and greater responsiveness to grant proposals.

Learning about wild edibles in Essex County, West Newbury; Bicycle and Birding Tour, Newburyport; Young participant in hearth cooking demonstration, Haverhill.



**Challenges** The special challenges of producing an event like Trails & Sails include the effort required to coordinate 71 partner sites and more than 100 events. Another challenge relates to the size and nature of many of the host organizations. Small nonprofits often do not have the resources to add another program to their schedule. In addition, most organizations need to be taught how they can use Trails & Sails to promote themselves. In addition to working with sites to develop more engaging visitor experiences, in the upcoming year, ENHAC staff will be helping sites develop coupons to encourage Trails & Sails participants to make return visits.

**Advice** Kate Fox, director of heritage tourism advises organizations planning a similar event to “Start early. It really does take nine to 12 months to plan.” Fox also says it’s important to “Start small. Don’t try to include everyone. Let the event evolve.”

**Contact Persons**

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# Strategic Engagement

## Shenandoah Valley Battlefields National Historic District Battlefield Preservation Planning Process

**Description** The Shenandoah Valley Battlefields National Historic District (SVBNHD) encompasses an eight-county area in northwestern Virginia where more than 325 armed conflicts took place during the Civil War. Creating preservation plans for core battlefields in the region is an important step in protecting these areas from encroaching development. The SVBNHD management organization's deliberate approach to developing its first plan included an overarching respect for property rights and a willingness to accede control of the process to landowners. The approach sets a high standard for community involvement in preservation planning.

### Relationship to Goals

The management plan for SVBNHD emphasizes participation by local communities in the preservation and interpretation of the battlefields and voluntary protection of the land. The development of the initial preservation plan for Cross Keys and Port Republic battlefields sought to build awareness and trust among landowners, to focus the management organization's preservation efforts, and to identify suitable tools for preservation in the area.

### Partners

The Shenandoah Valley Battlefields Foundation (SVBF) coordinates the actions of local communities in preservation, interpretation, and management of the battlefields. SVBF's partners in the development of the first preservation plan included Rockingham County (VA); the National Park Service American Battlefields Protection Program; and the more than 35 landowners who made up the plan's steering committee.

### External Investment

The development of the Cross Keys and Port Republic preservation plan was mainly funded by a \$35,000 grant from the American Battlefields Protection Program (ABPP). Rockingham County paid the salary of the planning department employee who served as liaison between the steering committee and the county government.

### Process

The creation of SVBNHD by Congress in 1996 recognized that protection of Civil War battlefields in the Shenandoah Valley required a regional approach to be successful in preserving the historic character of the area for future generations. The management plan calls for the creation of preservation plans for 10 battlefields identified in the historic district legislation.

SVBF chose to develop the plans for Cross Keys and Port Republic battlefields as one plan because of the sites' proximity and their historic relationship. These two sites were chosen as the first plan because the local government, Rockingham County, was in the process of updating its comprehensive plan in 2002.

After discussing the process with local government officials, SVBF held a public meeting for landowners where it floated the idea of creating a battlefields preservation plan. After receiving a "skeptical green light" from the landowners, the county agreed to partner with SVBF to develop the plan. SVBF helped the county to apply for an ABPP grant; the grant enabled the county to hire a consultant to manage the process. The consultant coordinated



the meetings and brought in experts to meet with the plan steering committee, which was composed of landowners in the Cross Keys and Port Republic battlefields area. The experts included a lawyer and a financial planner who discussed legal and economic issues in land preservation, an historian who talked about the significance of the battlefields in the war, as well as the lead consultant who had extensive experience in conservation and land planning. Of the range of preservation tools and the variety of protection options presented, the steering committee alone selected the recommendations contained in the final plan. Once the plan was completed, it was endorsed by the SVBF Board of Trustees and the Rockingham County Board of Supervisors and adopted by the county as part of its comprehensive plan.

### Organizational Investment

Managing the planning process occupied about 900 hours of SVBF staff time over 18 months. In addition to identifying the consultant and helping to obtain the ABPP grant to support the project, SVBF facilitated the planning process in a number of ways including providing administrative support, collecting information for the consultant, and occasionally meeting with landowners. One or two SVBF staff members attended every planning meeting. A portion of the NPS Heritage Partnership Programs appropriation for SVBF operations covered staff time associated with the planning process. Approximately \$3,000 of the NPS appropriation was used to cover report printing costs.

**Time Frame** The development of the Cross Keys and Port Republic preservation plan took 18 months from initial meetings to adoption by Rockingham County as part of its comprehensive plan.

**Outcomes** The preservation planning process had many benefits that should help ensure the protection of historic battlefield landscapes in the upper Shenandoah Valley. Landowners engaged in the process gained a new awareness of the area's Civil War history and of the tools available to preserve not only historic character but the area's agricultural heritage, which was especially important to them. The open nature of the process created an atmosphere of trust and respect that has already bolstered preservation efforts. In addition to approving a set of recommendations that included revisions to zoning ordinances, development of design guidelines for new agricultural buildings, and nominating the battlefields for National Register listing, a number of the landowners expressed interest in offering their land for purchase or in selling conservation easements. SVBF is currently negotiating with six property owners on land parcels ranging from 10 to 220 acres.

Since the completion of the Cross Keys and Port Republic preservation plan, SVBF has completed a second preservation plan encompassing the Fisher's Hill and Tom's Brook battlefields. While this process was similar to the first one, SVBF made changes to the form at based on the first planning experience. At its conclusion, even more property





owners approached SVBF to learn what they could do to preserve land in the core battlefield area.

SVBF was subsequently invited to make presentations on the Cross Keys and Port Republic battlefields preservation planning process at a number of conferences, including the 2004 conference of the Virginia chapter of the American Planning Association, the 2004 conference of ABPP, and the 2004 and 2005 conferences of APVA Preservation Virginia.

- Challenge** SVBF knew that developing a preservation plan for the area would excite deeply held beliefs about individual property rights. The organization's emphasis on voluntary land protection and the community-based preservation planning process helped reassure landowners and created an environment of trust and respect.
- Advice** Howard Kittell, executive director of SVBF, cautions that it is important to move slowly in developing a local preservation plan. "You want to reassure people that you're not trying to rush them into making a decision or trying to influence the outcome," Kittell says. He notes that it is also important to have local people either on your organization's board or who support the objectives of the process "who can stand up there with you" at community meetings. Finally, Kittell states that it's important to have the local government "on your side, even if not always agreeing with you."

**Contact Person**

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